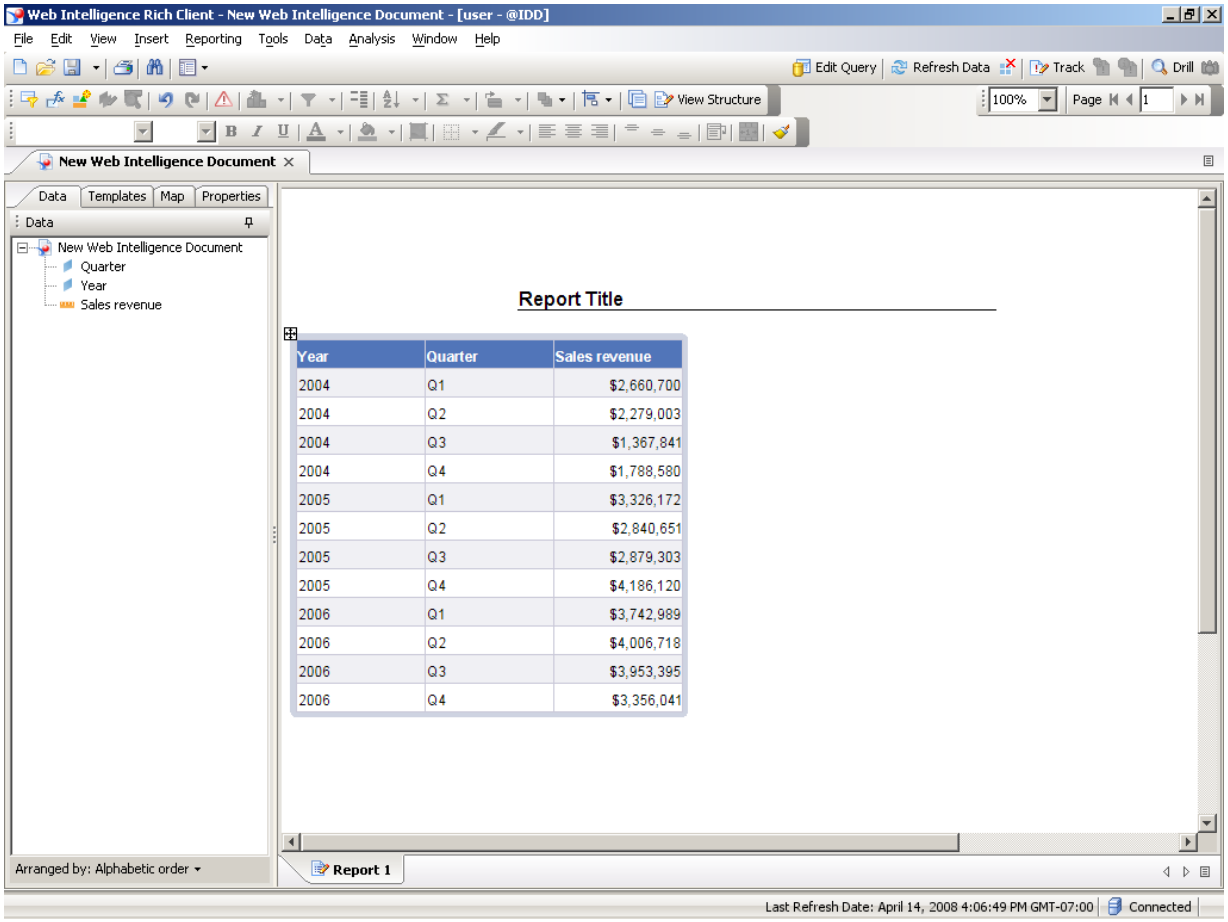
Procedure

1. Start the transaction using the menu path or transaction code.

Web Intelligence Rich Client



2. Press [Enter] to continue.

In the Web Intelligence Rich Client, you can save documents to your computer as Web Intelligence files (.wid), Portable Document Format files (PDF), or Excel files.

In this lesson, you will to save a document to your hard drive in both Web Intelligence and PDF file format.

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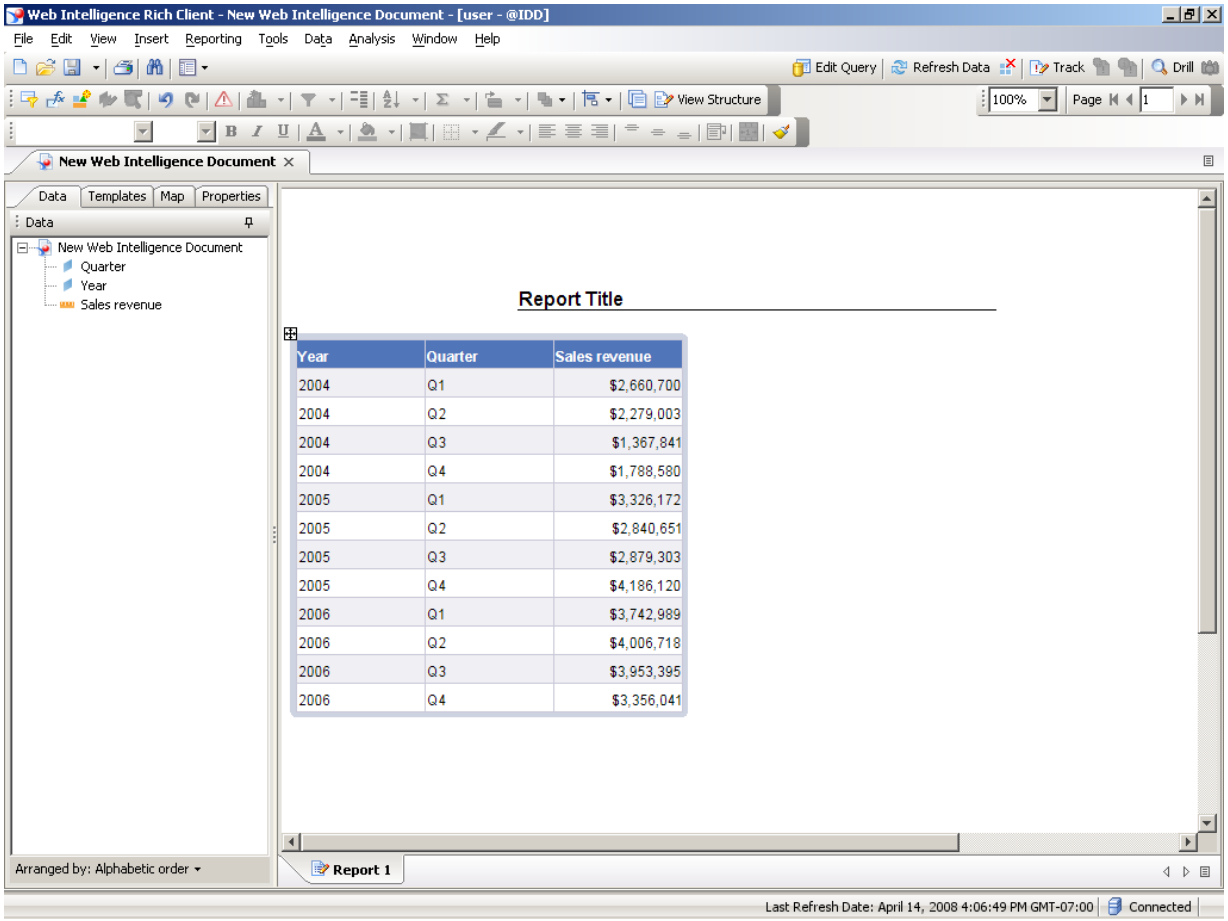
Press **[Enter]** to continue.

Web Intelligence Rich Client



3. Click **Save** .

First, save the new document to your computer as a Web Intelligence file.

4. Click **Save as...**.

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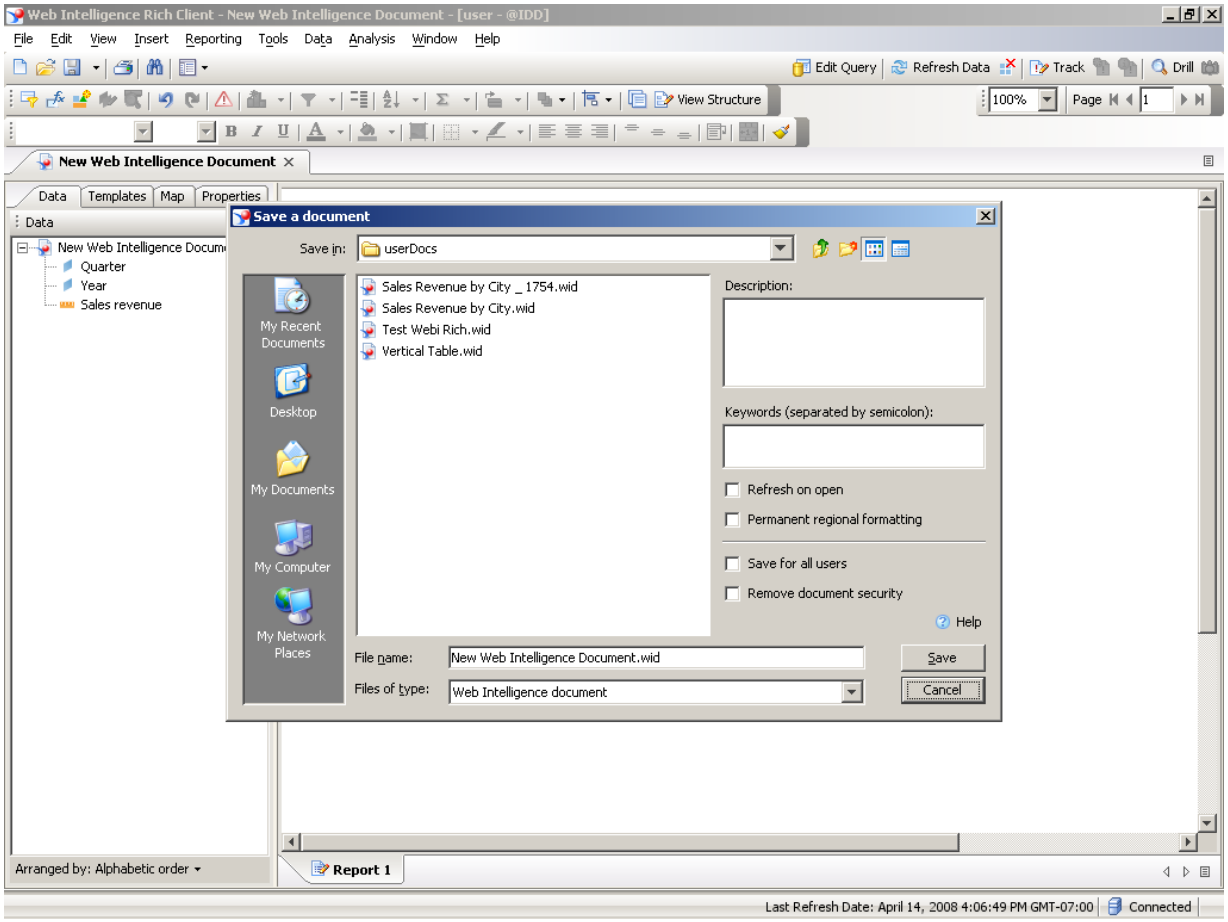
Save a document



5. Click in the**File name:** field.

In the Save a document dialog box, the file is called New Web Intelligence Document.wid by default.

In the actual program, to change the name to something more meaningful, you must highlight the file name with your mouse.

6. Press**[Delete]**.

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Delete the default file name.

7. As required, complete/review the following fields:

Field	R/O/C	Description
Title:	R	**Example:** Sales Revenue Report

Enter the new file name into the **File name:** field.

8. Click **Save**.

Saving a document to your Favorites folder and referenced in your My Sales Documents category means that it will be stored in an area on the BusinessObjects server that is reserved for your own use. No other user will be authorized to view this document.

You can now move or copy this document to other folder locations in InfoView if required.

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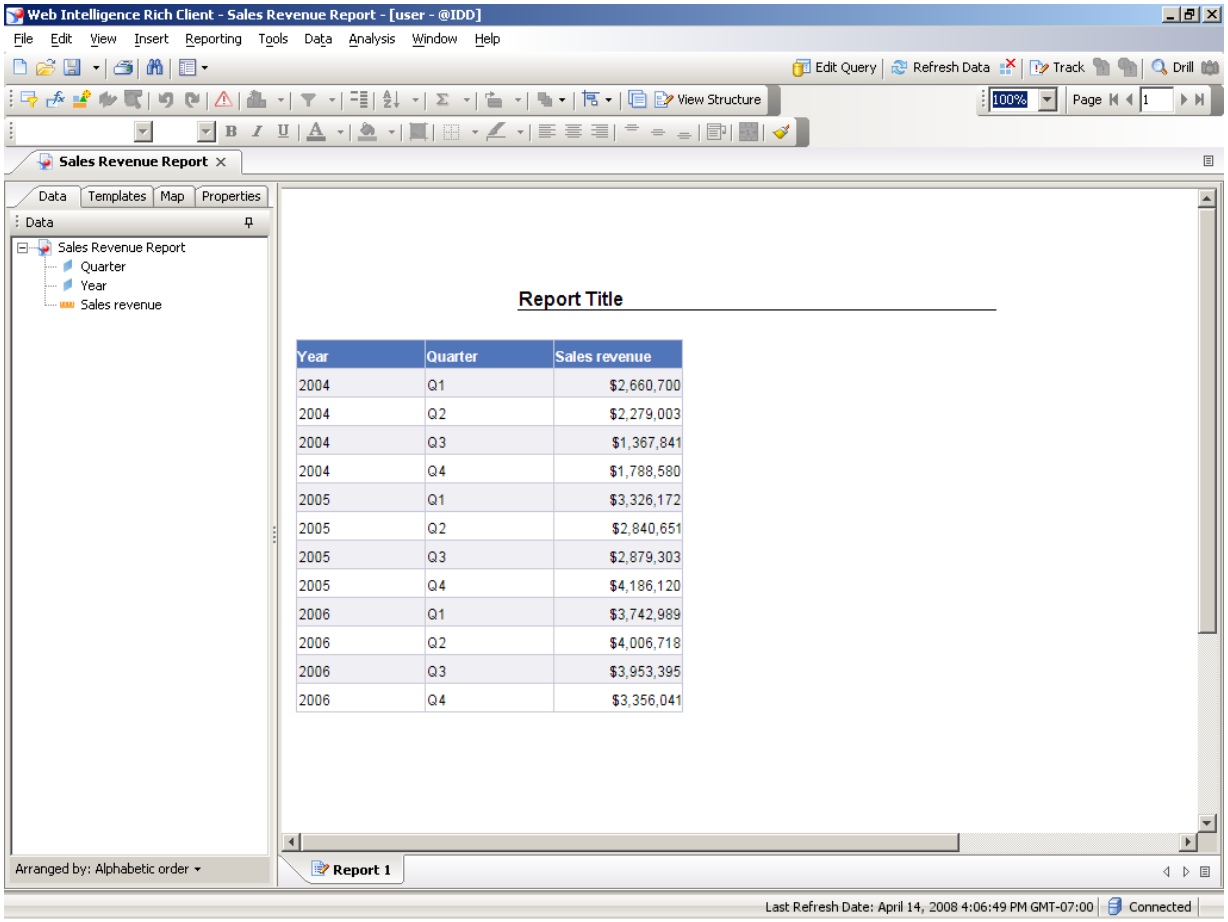
Web Intelligence Rich Client



9. Press [Enter] to continue.

The document has been saved to your hard drive, and its new file name appears on the document tab.

Press **[Enter]** to continue.

10. Click the arrow beside **Save** .

Now, save this same document as a PDF file.

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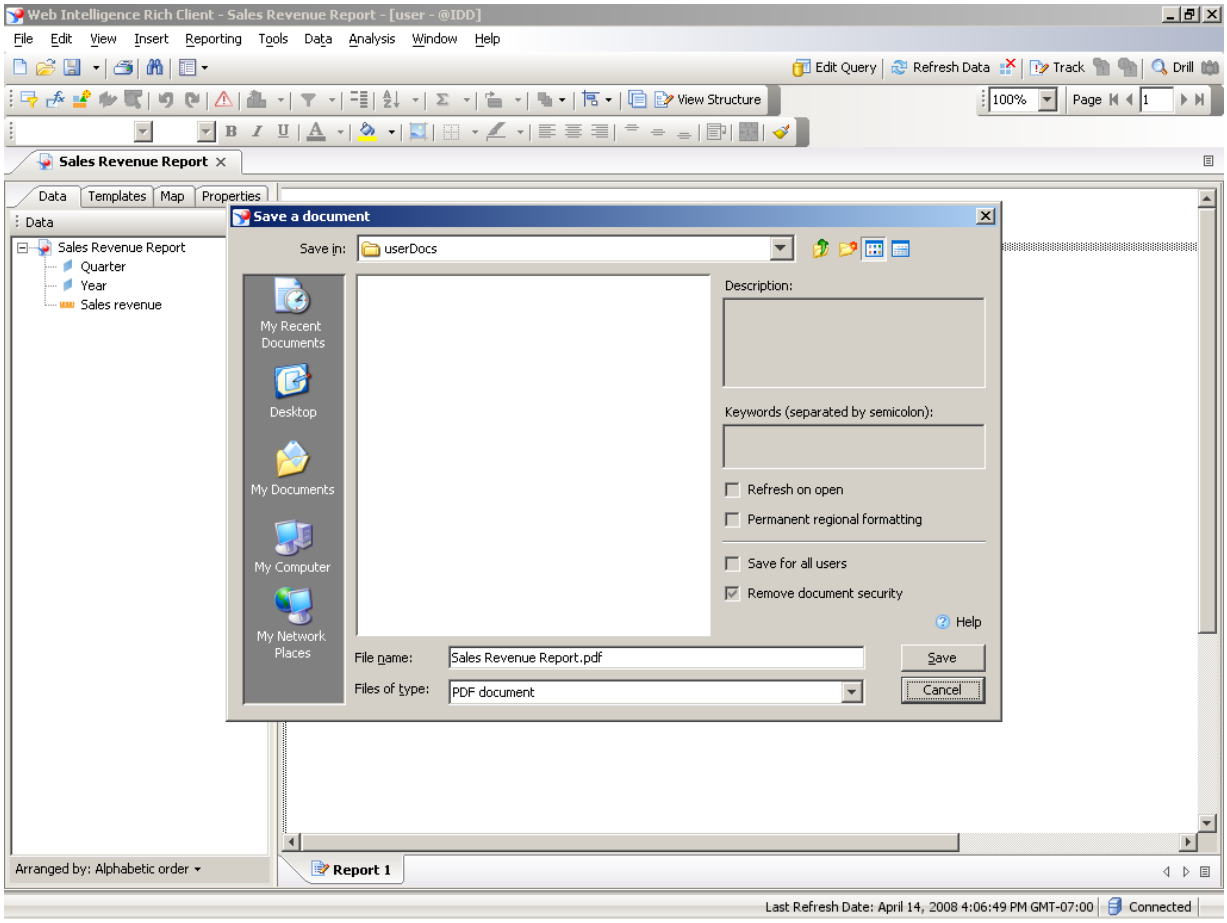
11. Click **Save to my computer as**.
12. Click **PDF**.

Save a document



13. Click **Save**.

By default, the file will save with the same filename as the Web Intelligence document with a .pdf file extension.

In this case, it will save as Sales Revenue Report.pdf.

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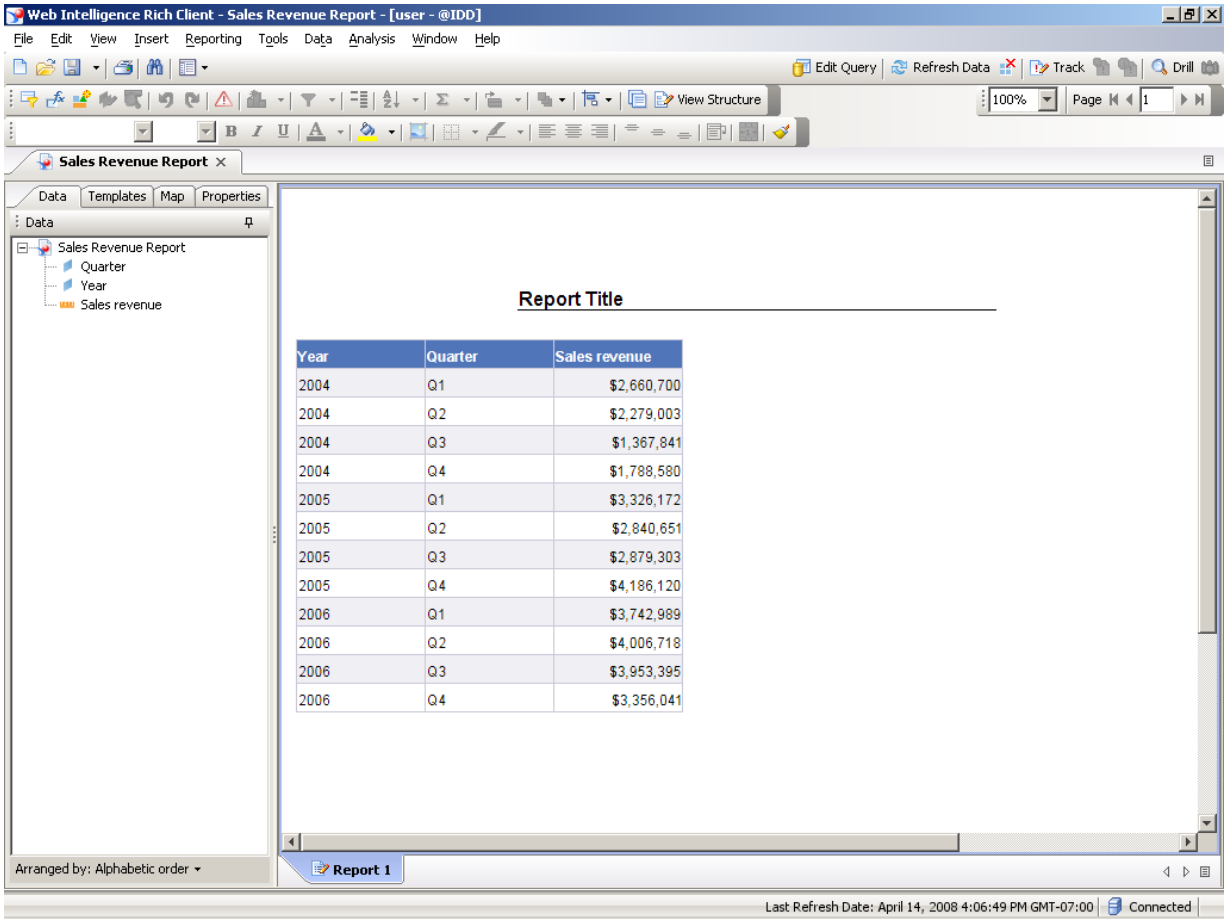
Web Intelligence Rich Client



14. Press [Enter] to continue.

Once the PDf is saved, you return to the Web Intelligence Rich Client screen.

Press **[Enter]** to continue.

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